

## SSA-308

We enter the information captured on the SSA-308 on the screens below via MCS or POS.

### Screen Name- Windfall Elimination Exclusion (WEPX)

**Description-** This is one of two screens used to establish information about the Number Holder's receipt of a pension based on non-covered employment and used to determine if the windfall elimination provision applies. We can access these screens through MCS or POS.

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MCS      TRANSFER TO: _____ WINDFALL ELIMINATION EXCLUSION      WEPX
NH
                                     CL

AGENCY/ORGANIZATION: _____
ADDRESS: _____
                                     _____

DOES WEP EXCLUSION APPLY (Y/N): Y
IF YES, LIST EXCLUSION (SELECT ONE): _
1. 30 YEARS OF COVERAGE
2. FIRST ELG TO RECEIVE PENSION BEFORE 1/1/86 - PROOF (P/N): _
3. PENSION BASED ON FED WORK COVERED BY SSA AFTER 12/31/83
4. PENSION FROM NON-PROFIT ORG EXEMPT FROM SS 12/31/83 & THEN MANDATORILY
   COVERED 1/1/84
5. PENSION BASED SOLELY ON WORK BEFORE 1957
6. PENSION BASED IN PART ON NONCOVERED MILITARY RESERVE FROM 1957-1987
7. FOREIGN TOTALIZED BENEFIT
8. PENSION BASED SOLELY ON RAILROAD EMPLOYMENT
9. OTHER(SPECIFY): _____

MORE(Y/N): N      DELETE THIS PENSION(Y/N): _      PENSION 1 OF 1
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### Screen Name- (WEPI)

**Description-** In MCS or POS, this conditional screen is automatically displayed when you answer "N" to [3-M] DOES WEP EXCLUSION APPLY on the WEPX screen.

ICERS  
NH

WINDFALL ELIMINATION INPUT

04/25/14

WEPI

SOURCE OF PENSION:  IF STATE SELECTED, SHOW ABBREVIATION: \_\_\_  
1. OPM 2. STATE (INCLUDES GU, PR, SM, VI) 3. US GOVT 4. OTHER

ELG DATE OF PENSION (MMYY): \_\_\_\_\_ ENT DATE OF PENSION (MMYY): \_\_\_\_\_  
GROSS MONTHLY PENSION AMT AT FIRST MONTH OF CONCURRENT ENTITLEMENT TO  
PENSION & SOCIAL SECURITY BENEFIT: \_\_\_\_\_ OR LUMP SUM AMOUNT: \_\_\_\_\_  
IF LUMP SUM, ENTER PERIOD COVERED BY LUMP SUM  
BEGINNING (MMYY): \_\_\_\_\_ THROUGH (MMYY): \_\_\_\_\_ OR TOTAL MONTHS: \_\_\_\_\_

PROOF OF PENSION AMT (P/N): \_\_\_ IF PENSION ENDED, DATE LAST RECD (MMYY): \_\_\_\_\_

IS THE PENSION BASED ON BOTH COVERED AND NON-COVERED SERVICE MONTHS (Y/N): \_\_\_  
TOTAL PENSION PERIOD (MMYY) FROM: \_\_\_\_\_ TO: \_\_\_\_\_ OR TOTAL MONTHS: \_\_\_\_\_  
NONCVRD PERIOD AFTER 1956 (MMYY) FROM: \_\_\_\_\_ TO: \_\_\_\_\_ OR TOTAL MONTHS: \_\_\_\_\_  
MORE(Y/N): **N** PENSION 1 OF 1